# WORLD AGRICULTURAL PRODUCTION AND TRADE

## Statistical Report

APRIL 1974

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FOREIGN AGRICULTURAL SERVICE U.S. DEPARTMENT OF AGRICULTURE

# RECORD WORLD TABLE OLIVE HARVEST

After a slight decline the year before, 1973 olive production rose to a record 296,100 short tons, 14 percent above the 1972 crop and 9 percent above the record 1971 harvest of 272,700 tons.

Although U.S. output represented only 23 percent of the total, the increase in 1973 world production was almost entirely accounted for by the 192 percent rise in the U.S. harvest. Production in Spain decreased slightly, while total output in Greece rose 11 percent.

Spanish 1973 production is placed at 154,000 tons, about 9 percent below the record 1972 crop of 169,800 tons. Trade officials state the decline in 1973 was attributed to drought conditions during the growing season. Although Spanish olives were reported generally smaller in size, quality is reported good. A slight decline in yield of the "other export varieties" and the "nonexport varieties accounted for almost all of the decrease in production. The varietal breakout of the 1973 crop is as follows (1972 output in parentheses): Manzanillas and similar varieties, 44,000 tons (49,500 tons); Queen, 27,000 tons (22,000 tons); other export varieties, 44,000 tons (52,800 tons); nonexport varieties, 39,000 tons (45,600 tons).

Greek production is currently estimated at 74,000 tons, 11 percent above the 1972 harvest of 66,900 tons. Increased production, according to trade officials, resulted principally from new tree output and the biennial production cycle. Good quality was reported, as favorable weather conditions prevailed and application of adequate pest control proved effective.

U.S. production is not usually considered too significant in the international market, as virtually all of its output is consumed domestically. For 1973, U.S. production is estimated at 68,000 tons, 192 percent above the 1972 short crop of 23,300 tons.

Exports from Spain and Greece are forecast at 120,000 tons in 1973-74, about 3 percent below the previous year's total of 123,200 tons. Faced with reduced output, Spain's 1973-74 exports are forecast at 87,000 tons, compared with 89,300 tons the year before. Greek exports are expected to remain at about the 1972-73 level of 33,000 tons.

The United States is a net importer of table olives, as imports account for over half its domestic consumption. During 1972-73, exports amounted to only 1,266 tons, slightly above the previous season's total of 1,251 tons. However, because of a relatively large 1973 crop, U.S. exports for 1973-74 are forecast at 3,045 tons, more than double last year's total.

TABLE OLIVES: Production in Selected Countries, Annual 1969-73
(In thousands of short tons)

| Country | 1969 | 1970 | 1971 | 1972 1/ | 1973 2/ |
|---|---|---|---|---|---|
| Greece .............. | 51.5 | 46.9 | 85.3 | 66.9 | 74.0 |
| Spain 3/............. | 66.0 | 60.0 | 138.0 | 169.8 | 154.0 |
| United States 4/ .... | 64.2 | 47.3 | 49.4 | 23.3 | 68.0 |
| Total .......... | 181.7 | 154.2 | 272.7 | 260.0 | 296.1 |

1/ Revised.
2/ Preliminary.
3/ Of this production, "Exportable to the U.S." quality totaled 52,900 tons in 1969; 47,400 tons in 1970; and 100,300 tons in 1971; 71,600 tons in 1972, and 71,600 tons in 1973.
4/ Table Olives equal total olive production minus amount crushed for oil, fresh sales, and farm usage.

TABLE OLIVES: Exports from Selected Countries, Marketing Year 1/ 1969-1973
(In thousands of short tons)

| Country of Origin | 1969-70 | 1970-71 | 1971-72 | 1972-73 2/ | 1973-74 3/ |
|---|---|---|---|---|---|
| Greece .............. | 14.2 | 19.0 | 22.7 | 32.9 | 33.0 |
| Spain 4/............. | 66.1 | 71.6 | 82.7 | 89.3 | 87.0 |
| United States ....... | 1.8 | 1.1 | 1.3 | 1.3 | 3.0 |
| Total .......... | 82.1 | 91.7 | 106.7 | 123.5 | 123.0 |

1/ United States and Greece--year beginning November 1; Spain--year beginning December 1.
2/ Preliminary.
3/ Forecast.
4/ Includes exports of both "Exportable to the U.S." and "Other Exportable" quality olives.

# SISAL PRODUCTION FORECAST DOWN IN 1974, ABACA OUTPUT TO INCREASE

## Sisal and Henequen

World sisal and henequen production in 1974 is forecast at 1.78 billion pounds, or 2 percent less than in 1973. Most of the decrease can be attributed to expectations of smaller outturns for Brazil and Kenya. Production increases are forecast for most of the other major producing countries, especially Angola, and to a lesser degree, Haiti, Malagasy Republic, and Mexico.

In 1973, total production was 1.81 billion pounds, up 3 percent from 1972, and 4 percent above the 1965-69 average outturn. Rapidly rising prices along with strong domestic and foreign demand pushed 1973 output in Brazil and Kenya well above 1972 levels. Drought continued to adversely affect yields in Tanzania, where output fell off slightly, while Angolan production was down significantly. Mexican production of henequen was down about 3 percent from 1972.

Because producing countries, in general, are expanding domestic processing facilities, lesser quantities of raw fiber have been moving to traditional European processing centers. In 1972, for example, Brazil's exports of baler twine totaled 19,665 metric tons, compared with 24,313 tons exported the first 9 months of 1973, and even more raw fiber is scheduled to be used in baler twine manufacture in 1974. In the United States, only one plant is still processing agricultural twine from raw sisal fiber.

As of mid-April 1974, the price for Tanzanian/Kenyan sisal, UG grade, was being quoted at $1,075 per metric ton, c.i.f. European ports, compared with about $420 a year earlier. Brazilian, type 2, Bahia sisal, c.i.f. Europe, was quoted at $1,037 per ton, also up sharply from March 1973 levels.

## Abaca

Philippine abaca accounts for about 90 percent of world production, with Ecuador being the only other country contributing significantly to availabilities. Of an estimated total world output of 195 million pounds in 1973, Philippine production accounted for 181 million pounds. Sharply higher prices for raw fiber has brightened the outlook for both Philippine and Ecuadorian production, with total 1974 output forecast at 228 million pounds, an overall increase of 16 percent. Domestic prices in the Philippines for high grade S2 fiber rose from an average of 121 pesos per picul of 139.4 pounds (12.9 cents per pound) in February 1973 to 400 pesos (42.8 cents per pound) at the end of February 1974. The United States continues to lead all foreign buyers of Philippine abaca, taking 34 percent of 1973 exports of 58,307 metric tons. While the Philippine cordage industry utilizes the bulk of abaca consumed domestically, larger quantities are going into pulp and handicrafts. In many importing countries, including the United States, the use of abaca in specialty paper manufacture has assumed major importance.

HARD FIBERS: World production by countries, average 1965-69, annual 1971-74

(In millions of pounds)

| Fiber and country | Average 1965-69 | Calendar year 1971 | 1972 | 1973 1/ | 1974 2/ |
|---|---|---|---|---|---|
| Sisal: | | | | | |
| Angola | 136.3 | 143.3 | 150.0 | 132.2 | 154.0 |
| Brazil | 427.5 | 463.0 | 573.2 | 628.3 | 571.0 |
| China, Republic of (Taiwan) | 23.0 | 15.4 | 16.8 | 17.2 | 18.0 |
| Haiti | 45.8 | 28.7 | 31.1 | 37.0 | 42.0 |
| Kenya | 120.4 | 98.8 | 90.8 | 127.9 | 110.0 |
| Malagasy Republic | 53.3 | 50.7 | 53.6 | 52.9 | 58.0 |
| Mozambique | 68.7 | 55.1 | 48.5 | 50.0 | 48.0 |
| Tanzania | 471.3 | 399.0 | 346.0 | 342.6 | 348.0 |
| Others 3/ | 67.0 | 86.0 | 90.0 | 84.0 | 84.0 |
| Total | 1,413.3 | 1,340.0 | 1,400.0 | 1,472.1 | 1,433.0 |
| Henequen: | | | | | |
| Mexico | 306.7 | 320.0 | 320.0 | 309.0 | 317.0 |
| Others 3/ | 30.9 | 33.0 | 37.0 | 33.0 | 33.0 |
| Total | 337.6 | 353.0 | 357.0 | 342.0 | 350.0 |
| Abaca: | | | | | |
| Philippines | 200.4 | 149.0 | 161.4 | 181.2 | 201.0 |
| Others 3/ | 11.0 | 6.6 | 7.7 | 14.3 | 27.0 |
| Total | 211.4 | 155.6 | 169.1 | 195.5 | 228.0 |

1/ Preliminary. 2/ Forecast. 3/ Partially estimated.

## WORLD OLIVE OIL PRODUCTION TO BE UP SLIGHTLY IN 1973-74

World production of pressed olive oil for 1973-74 is currently estimated at 1.6 million metric tons—24,000 tons above the preliminary forecast (*World Production and Trade Statistical Report,* December 1973) and 141,000 tons above the 1972-73 outturn. The increase reflects larger output in Italy, Tunisia, and Spain, partly offset by reduced olive oil production in Greece, Turkey, and Portugal. Fluctuations in olive oil production are greatly influenced by a biennial yield cycle. However, yearly fluctuations in world production are minimized by the fact that yield cycles for major producing countries are not in harmony.

Total 1973-74 supplies of pressed olive oil are estimated at 1.9 million tons, compared with 1.8 million tons last year. Olive oil consumption has been declining slightly during the past three seasons and some buildup of stocks is expected in major producing countries.

Net exports from major producing countries in calendar 1974 are forecast to rise to 125,000 tons—7 percent above 1973. In 1974 Italy is expected to reduce imports and Tunisia may export more olive oil.

Olive oil production in **Italy** is estimated at 520,000 tons—180,000 tons or 53 percent above 1972-73 production. This year's outturn is larger than previously estimated due to favorable weather and relatively little insect damage. Consequently, Italy is expected to need less imported olive oil this year to cover domestic consumption.

**Spain's** olive oil production for 1973-74 is currently estimated at 500,000 tons—14 percent or 60,000 tons above last season. Spain experienced another relatively large olive crop this season, primarily due to good growing weather in 1973. Although Spain is usually a major exporter of olive oil, 1974 exports are being restricted by the Government to rebuild olive oil stocks. During the vegetable oil shortage in 1973, consumption of olive oil has remained about constant, despite higher prices for olive oil relative to seed oils. As other vegetable oils become more adequate in Spain this season and prices decline, consumption of olive oil may suffer.

In **Greece** production of olive oil is expected to be 192,000 tons—down 57,000 tons from last season's output. Farmers are still holding sizable olive oil stocks due to low Government offer prices as well as uncertainty concerning future Governmental price policy. Prices were raised 25-30 percent by the Government in July 1973, but producers still preferred to hold a large part of their olive oil output rather than sell to the Government. Some producers have reportedly been selling directly to merchants and consumers and thus receiving above ceiling prices. To relieve the shortage, the Greek Government has arranged to import larger quantities of olive oil to supply domestic consumers and has placed an export embargo on bulk olive oil during this period.

**Tunisian** olive oil output is forecast at 130,000 tons—the second largest on record and 60,000 tons larger than in 1972-73. As a result of this increase, Tunisia's olive oil exports are expected to increase substantially from the 51,000-ton volume of 1973. Domestic consumption of other vegetable oils in Tunisia is being encouraged to free more olive oil for the export market. The Tunisian Government continues to recommend new olive tree plantings and more efficient management of established groves.

**Turkey** is estimated to produce only 55,000 tons of olive oil in 1973-74—an offyear in the biennial cycle. However, production should exceed the 2 previous offyears because some new groves have come into commercial production this year. Due to reduced supplies, the new Turkish Government banned olive oil exports for an indefinite period, effective in February.

Olive oil production in **Portugal** is estimated at only 35,000 tons—the smallest outturn since 1967, partly reflecting declining tree numbers. As older groves become unproductive, they are being cut down and are not replaced by new plantings. The Portuguese Government is currently encouraging increased production of other oilseeds, such as safflower and sunflower.

**United States** imports of edible olive oil for January and February 1974 totaled 4,278 metric tons, compared with 3,195 metric tons for the same period in 1973.

The price of Spanish edible olive oil, 1 percent, drums, has been unquoted since November 1973. At that time the monthly average price was $1,507 per metric ton, compared with $999 per metric ton a year earlier—a 52 percent increase. The price spread between olive oil and soybean oil increased from 34.6 cents a pound in January 1973 to 46 cents a pound in November 1973.

Olive Oil: 1/ Estimated world production, annual 1967-68/1973-74
(In 1,000 metric tons)

| Country | 1967-68 | 1968-69 | 1969-70 | 1970-71 | 1971-72 | 1972-73 2/ | 1973-74 2/ |
|---|---|---|---|---|---|---|---|
| Europe: | | | | | | | |
| Greece | 194 | 154 | 156 | 198 | 183 | 249 | 192 |
| Italy | 537 | 384 | 473 | 420 | 616 | 340 | 520 |
| Portugal | 81 | 53 | 72 | 67 | 42 | 54 | 35 |
| Spain | 259 | 480 | 358 | 475 | 341 | 440 | 500 |
| Total | 1,071 | 1,071 | 1,059 | 1,160 | 1,182 | 1,083 | 1,247 |
| Middle East: | | | | | | | |
| Israel | 3 | 1 | 4 | 1 | 1 | 3 | 1 |
| Jordan | 18 | 9 | 5 | 1 | 6 | 0 | 9 |
| Syria | 22 | 22 | 26 | 15 | 18 | 34 | 15 |
| Lebanon | 12 | 5 | 7 | 3 | 11 | 7 | 12 |
| Turkey | 60 | 126 | 50 | 110 | 51 | 154 | 55 |
| Total | 115 | 163 | 92 | 130 | 87 | 198 | 92 |
| Africa: | | | | | | | |
| Algeria | 22 | 18 | 22 | 13 | 23 | 12 | 24 |
| Morocco | 18 | 50 | 16 | 30 | 55 | 30 | 35 |
| Tunisia | 51 | 55 | 25 | 90 | 167 | 70 | 130 |
| Libya | 28 | 6 | 13 | 1 | 20 | 7 | 15 |
| Total | 119 | 129 | 76 | 134 | 265 | 119 | 204 |
| Argentina | 13 | 12 | 10 | 21 | 9 | 20 | 18 |
| Other 3/ | 17 | 9 | 8 | 7 | 12 | 12 | 12 |
| World total | 1,335 | 1,384 | 1,245 | 1,452 | 1,555 | 1,432 | 1,573 |

1/ Production in marketing year beginning November 1. 2/ Preliminary. 3/ Includes Cyrus, Iran, Chile, Uruguay, Peru, U.S., Australia, France, Yugoslavia, and South Africa.

Olive Residue Oil: 1/ Estimated world production, annual 1967-68/1973-74
(In 1,000 metric tons)

| Country | 1967-68 | 1968-69 | 1969-70 | 1970-71 | 1971-72 | 1972-73 2/ | 1973-74 2/ |
|---|---|---|---|---|---|---|---|
| Europe: | | | | | | | |
| Greece | 23 | 18 | 19 | 24 | 22 | 30 | 23 |
| Italy | 57 | 40 | 45 | 42 | 45 | 40 | 48 |
| Portugal | 20 | 12 | 9 | 3 | 8 | 6 | 5 |
| Spain | 22 | 41 | 26 | 33 | 24 | 31 | 35 |
| Total | 122 | 111 | 99 | 102 | 99 | 107 | 111 |
| Middle East: | | | | | | | |
| Syria | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Lebanon | 2 | 2 | 1 | (3/) | 1 | 1 | 1 |
| Turkey | 12 | 18 | 7 | 15 | 7 | 22 | 10 |
| Total | 16 | 22 | 10 | 17 | 10 | 25 | 13 |
| Africa: | | | | | | | |
| Algeria | 1 | 1 | 3 | 2 | 1 | 1 | 2 |
| Morocco | 1 | 6 | 2 | 3 | 6 | 4 | 5 |
| Tunisia | 6 | 8 | 3 | 7 | 16 | 6 | 14 |
| Total | 8 | 15 | 8 | 12 | 23 | 11 | 21 |
| World total | 146 | 148 | 117 | 131 | 132 | 143 | 145 |

1/ Partly refined for edible use. 2/ Preliminary. 3/ Less than 500 tons.

Olive Oil, Edible: Aggregate of estimated supplies and requirements in producing countries, 1967-68/1973-74
(In 1,000 metric tons)

| Item | 1967-68 | 1968-69 | 1969-70 | 1970-71 | 1971-72 | 1972-73 1/ | 1973-74 2/ |
|---|---|---|---|---|---|---|---|
| Supply: | | | | | | | |
| Stocks 3/ | 401 | 482 | 540 | 377 | 398 | 391 | 349 |
| Production 4/ | 1,335 | 1,384 | 1,240 | 1,452 | 1,555 | 1,432 | 1,573 |
| Total supply | 1,736 | 1,866 | 1,780 | 1,829 | 1,953 | 1,823 | 1,922 |
| Distribution: | | | | | | | |
| Net exports 5/ | 82 | 94 | 94 | 106 | 113 | 117 | 125 |
| Apparent domestic consumption 6/ | 1,172 | 1,232 | 1,309 | 1,325 | 1,449 | 1,363 | 1,359 |
| Ending stocks | 482 | 540 | 377 | 398 | 391 | 349 | 438 |
| Total distribution | 1,736 | 1,866 | 1,780 | 1,829 | 1,953 | 1,823 | 1,922 |

1/ Preliminary. 2/ Forecast.
3/ Estimated stocks in Spain, Greece, Portugal, Tunisia, and Turkey on November 1; in Italy, October 1; in France and Morocco, January 1.
4/ Estimated world output of edible olive oil, crop year beginning November 1.
5/ Calendar year exports of latter year shown.
6/ Derived consumption in producing countries.

Compiled from official and other sources.

Olive Oil: 1/ Exports from and imports into selected countries, for specified periods in 1973 and 1972 with comparisons
(In metric tons)

| Item and country | 1971 | 1972 | Period | 1972 | 1973 |
|---|---|---|---|---|---|
| Exports: | | | | | |
| Europe: | | | | | |
| France | 11,079 | 21,107 | January-September | 16,127 | 14,255 |
| Greece | 3,776 | 9,496 | January-December | 9,496 | 20,000 |
| Italy | 17,605 | 17,993 | January-August | 13,145 | 9,818 |
| Portugal | 10,151 | 8,415 | January-September | 5,720 | 4,615 |
| Spain | 199,225 | 76,404 | January-September | 55,178 | 132,094 |
| Middle East: | | | | | |
| Israel | 50 | 28 | January-October | 23 | 125 |
| Turkey | 1,335 | 3,413 | January-December | 3,413 | 2/ 53,000 |
| Africa: | | | | | |
| Algeria | 2,000 | 3,600 | January-December | 3,600 | 2,000 |
| Morocco | 6,643 | 34,156 | January-August | 31,703 | 19,180 |
| Tunisia | 66,823 | 126,159 | January-December | 126,159 | 51,200 |
| Other: | | | | | |
| Argentina | 7,205 | 7,257 | January-November | 6,802 | 9,714 |
| Total exports | 325,892 | 308,028 | | 271,366 | 316,001 |
| Imports: | | | | | |
| Producers: | | | | | |
| France | 35,624 | 37,708 | January-September | 31,972 | 37,896 |
| Italy | 176,632 | 124,210 | January-August | 74,310 | 140,463 |
| Subtotal | 212,256 | 161,918 | | 106,282 | 178,359 |
| Other: | | | | | |
| United States | 27,979 | 30,439 | January-December | 30,439 | 27,181 |
| West Germany | 4,728 | 4,152 | January-November | 3,712 | 3,323 |
| United Kingdom | 3,181 | 3,044 | January-November | 2,872 | 3,206 |
| Brazil | 11,499 | 14,100 | January-December | 14,100 | 2/ 13,500 |
| Subtotal | 47,387 | 51,735 | | 51,033 | 47,210 |
| Total imports | 259,643 | 213,653 | | 157,315 | 225,569 |

1/ Excludes olive residue oil if separately classified. 2/ Estimated.

# COTTON CONSUMPTION IN SELECTED IMPORTING COUNTRIES

Consumption of raw cotton in a sample of 15 importing countries for which monthly data are available has leveled off in the early months of the 1973-74 season, but this is expected to change by the end of the season. In the aggregate, consumption is estimated at roughly 400,000 bales more than the 10 million bales consumed by these same countries last season, representing a sharp increase for a few countries, a small decrease in consumption in several others, and virtually no change in the remainder. All of these countries depend entirely on imports for their supplies and nearly all are showing increased shipments during the first 4 to 6 months of the season—in part due to increased availability of U.S. cotton early in the season. Contrary to estimated totals for consumption, aggregate imports in the selected countries are not expected to change for the year.

Consumption rose in the early months of 1973-74, primarily in Far Eastern textile manufacturing countries, specifically Hong Kong, Taiwan, and in small measure, Japan. For Hong Kong and Taiwan, the increase is thought to be an accurate indicator of the direction consumption will take during the remainder of the year, while the slight increase for Japan points to no significant change for the year. Oddly enough, data for Korea show a decrease during August-November, despite an anticipated sharp increase for the year. The European countries for the most part show insignificant changes, except for the United Kingdom, where a drop of 36,000 bales has occurred. In general, the European countries examined are expected to register small declines in consumption for the year, though consumption in France may increase slightly due to greater yarn and thread manufacturers, and the Scandinavian countries may e maintain a steady intake.

The level of imports during the e current season contrasts sharply with re tion figures. Virtually all the selected large increases over comparable peri These imports reflect the heavy bı 1973—when prices were rising at rates—and have thus far served to increa the direction of change in individual widely. The largest increases were ı Eastern countries with expanding tı (Hong Kong, Korea, Taiwan), where pected to be up substantially for the ye major European importing countries weı though their 1973-74 imports are not ex higher than in 1972-73.

The conflicting nature of the sh available and the expected outcome in c trade for the entire year indicate in some array of cotton and textile markets dur and a half. While those conditions relat crisis will have an impact on major indı tries' economies, basic cotton consump recent years are expected to continue. importing countries and the exporting countries (LDC's) are the markets most while consumption in industrialized cou textile industries will probably continue t off.

COTTON: Imports, consumption, and current stocks in principal foreign non-Communist importing countries, for specified periods, 1972-73 and 1973-74 1/

(In 1,000 bales of 480 lb. net)

| Country | Reporting period | Imports 1972-73 | Imports 1973-74 | Consumption 1972-73 | Consumption 1973-74 | Stocks Aug 1 | Stocks Current (computed) | Change in stocks since Aug 1, 1973 |
|---|---|---|---|---|---|---|---|---|
| Austria | Aug-Jan | 46 | 51 | 51 | 53 | 26 | 24 | - 2 |
| Belgium | Aug-Nov | 88 | 81 | 80 | 80 | 124 | 125 | + 1 |
| Canada | Aug-Nov | 105 | 111 | 110 | 110 | 62 | 63 | + 1 |
| Finland | Aug-Jan | 25 | 30 | 33 | 32 | 71 | 69 | - 2 |
| France | Aug-Oct | 189 | 215 | 242 | 243 | 277 | 249 | - 28 |
| Germany, West | Aug-Nov | 230 | 312 | 358 | 358 | 448 | 2/ 382 | - 66 |
| Hong Kong | Aug-Nov | 166 | 278 | 224 | (250) | 149 | 177 | + 28 |
| Italy | Aug-Nov | 200 | 277 | 275 | 280 | 321 | 3/ 323 | + 2 |
| Japan | Aug-Jan | 1,664 | 1,676 | 1,696 | 1,700 | 1,992 | 1,968 | - 24 |
| Korea, South | Aug-Nov | 152 | 262 | 188 | 151 | 77 | 188 | +111 |
| Netherlands | Aug-Nov | 60 | 68 | 81 | 77 | 37 | 28 | - 9 |
| Sweden | Aug-Dec | 6 | 14 | 18 | 19 | 30 | 25 | - 5 |
| Switzerland | Aug-Dec | 75 | 94 | 94 | 95 | 154 | 153 | - 1 |
| Taiwan | Aug-Nov | 171 | 317 | 200 | 230 | 308 | 395 | + 87 |
| United Kingdom | Aug-Dec | 264 | 288 | 279 | 243 | 270 | 2/ 300 | + 30 |
| Total | | 3,441 | 4,074 | 3,929 | 3,921 | 4,346 | 4,469 | +123 |

1/ Preliminary and partly estimated.
2/ Allowance made for reexports.
3/ Includes crop of 5,000 bales.

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# NEW PUBLICATIONS

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Cotton in Turkey (FC 6-76)
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